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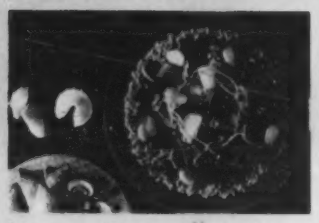
R&I EXCLUSIVE: HOW AMERICA'S TASTES ARE CHANGING...42



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DECEMBER 9, 1988

A Cahners publication serving the total foodservice industry

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R&I EXCLUSIVE

■ CONSUMER SURVEY

The Changing TASTES

New meal occasions, value demands and adults who eat like kids make foodservice one tough market to call.

When *Restaurants & Institutions* published its first Tastes of America survey in December 1980, the average American household ate out 6.4 times a week at a cost of $22.71. One-third of the general public thought that meals away from home were a poor value, though almost half still chose eating out as their No. 1 leisure activity. Customers were saying no to desserts, yes to salads; and only young mothers admitted to counting calories.

Nine years, three droughts and one market plunge later, a typical household eats 10.3 meals away from home during the week and spends $31.72 to do so. Only one-sixth of the public considers foodservice a poor value, but two-thirds complain about service. Americans who dine out opt for more chicken and fish—grilled, not blackened or deep-fried—and two in three say they care about nutrition.

It's a different foodservice market, but as the 1988 Tastes of America survey shows, it's still strong in many ways. To compile the survey, the market research firm of National Family Opinion sent out questionnaires to 2,000 representative households. Participants returned 1,309 replies for a 65% response rate. (Polling only households excludes institutional settings like hospitals and military bases.)

Forecasters who expected to see Black Monday's aftershocks in this year's register tapes have not yet been proven correct: Most upward trends of the last few years continue. A third of those polled say they eat more meals away from home now than last year. Customers try new restaurants more often than in times B.C.—Before Crash.

But next year's dining habits will be the product of *this* year's opinions; and the attitudinal portion of the survey offers little cause for celebration. Patrons like the ease of a meal away from home, but they are much less content with its price/value. If rising costs force a general hike in menu prices, eroding value may become the industry's biggest headache.

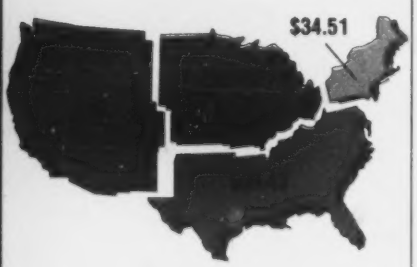
The market is becoming at once less predictable and less forgiving. This year's respondents say one-fifth of their dining out occurs outside traditional meal occasions: What impact will that have on tomorrow's menus? With boomers off having babies, can seniors, empty-nesters and the "old-old" replace them as the demographic forces that drives the industry? And can restaurateurs mute the rising chorus of complaints about quality, service and—that word again—value?

By Lisa Bertagnoli, Brian Quinton and Jeff Weinstein

RESTAURANTS & INSTITUTIONS

OF AMERICA

REGIONAL WEEKLY BUDGETS



WEEKLY EATING-OUT BUDGETS INCREASE

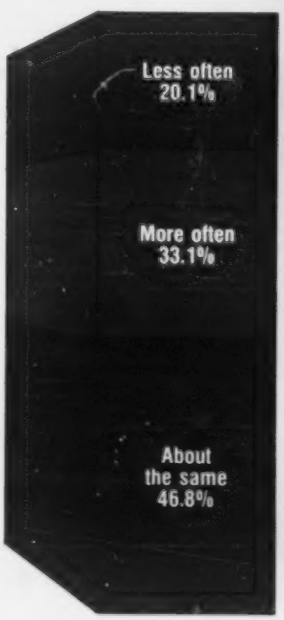
The average household is now spending $31.72 a week on food away from home, an increase of more than 2% over last year. The biggest spenders are married couples without children ($42.15 a week), while older singles dish out the least ($15.02). Regionally speaking, low unemployment in the Northeast may account for the high $34.51 weekly eating-out budget. More precisely, households in New England are spending an average of $37.62. In the West, Mountain region households spend $28.28, compared to $36.60 by their Pacific region neighbors.

TASTES OF AMERICA

WEEKLY ROUTINES
The number of meals eaten away from home in a week by the average household increased by more than 25% in the past year. Working couples with children under the age of 19 eat out 14.4 times a week. Those more concerned about nutrition eat out 11 times a week.

	1987	1988
All respondents	8.0	10.3
Household of 1	5.7	6.9
Household of 2	7.2	9.2
Household of 3	9.5	13.2
Household of 4	9.8	12.5
Household of 5	10.5	13.1

EATING PATTERNS
Percentage eating out more often this year compared to last year:



Consumers say convenience and value factors are prompting them to eat out more often.

Young or old, single or married, consumers responding to the 1988 Tastes of America survey continue to eat out more often. This year, 89.4% report they have eaten out in the past week, 96% in the past month, and more than 33% are eating out more often compared to last year.

"Our family eats out more often now that I'm working again," says Annette VanderPloeg, a 36-year-old married mother of three. "We'll probably go out even more in the future because the children have busy schedules too.

"There are a lot more activities for the kids today than when I was young," adds VanderPloeg. "So the family tends to eat out more often because we are always concerned about getting to soccer practice, the hockey arena or a piano lesson. My friends do the same thing."

Seventy-five-year-old widow Dorothy Milligan dines out about three times a week these days. "I go out for the convenience," says Milligan. "I'm older, my friends are about the same age and we find it easier to go out to eat and then take in a movie or whatever we're going to do.

"Once in a while I do entertain at home, but I find I do less and less of that," Milligan adds. "It's so much easier and simpler to go out to eat."

One hundred percent of young singles responding to the survey eat out at least once a week and 45% are eating out more often than last year. Fernando Mendez, 22, is no exception. "As my schedule gets busier, I find myself dining out as many as four times a week," he says. "I also like saving time at a restaurant and not having to worry about washing dishes. It makes any added expense worth it."

Survey results also show that 100%

Gary Fishleigh (r.) says his dining plans are often improvised.

of married couples, working full-time, with or without children, ate out at least once in the past month.

As the number of meal occasions per household increases, so do eating-out budgets, especially among younger consumers. "Our family eating-out budget has increased and now ranges anywhere from $40 to $60 a week," says Gary Fishleigh, a 33-year-old married father of two young children.

Young singles spend $38.31 in an average week, compared to $25.38 for middle-aged singles and $15.02 for older singles. Young couples spend $37.36 a week, versus $36.09 for older working couples and $25.10 for older retired couples. This pattern reverses, however, among parents. The average eating out budget gradually increases from $30.01 for young parents to $37.72 for older parents. The biggest weekly budget ($42.15) is found among married couples, working full-time, without children under 19 years old.

Looking ahead to 1989, 10.5% of survey respondents expect to eat out more often next year, ranging from 7.7% among middle-aged singles to 15% among older working couples. But they may be underestimating their plans for 1989. Last year, 12% said they planned to eat out more often in 1988. But this year's results show that in actuality, 33% ate out more often. What group will be eating out less often in 1989 compared to 1988? The survey reveals that 27% of older singles expect to cut back.

Dining patterns changing

As households grow busier with outside activities, breakfast, lunch and dinner continue to blur. In an average week this year, the number of meals eaten away from home attributed to the three traditional meal times remained steady, but the period classified as "other" made substantial gains, proving that consumers eat when they have the time, not necessarily when tradition dictates.

Among households of three or more, more than 24% of the meals eaten out during the average week are attributed to the "other" meal period, 28% among middle-aged parents and 33% of single parents with children under age 19.

Lunch, however, remains the most popular meal eaten away from home. In an average week, 37.3% of all meals

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THE "OTHER" MEAL

Respondents are having a more difficult time matching dining experiences with specific meal occasions. Almost 21% of weekly meals eaten out by a total household were assigned to the "other" category.

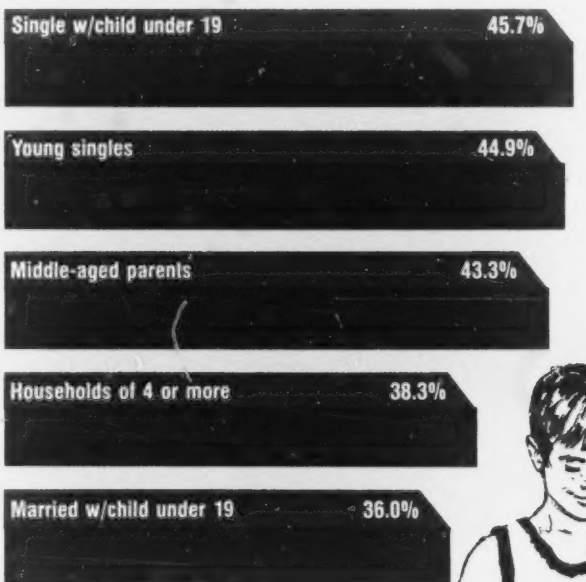
Meals eaten away from home in an average week

	Total household	Male head of household	Female head of household	Child/ teen
Breakfast	12.2%	14.7%	12.2%	7.3%
Lunch	37.3	38.9	37.6	33.9
Dinner	29.3	27.7	32.4	26.8
Other	21.2	18.8	17.8	32.0

GROWING CUSTOMER BASES

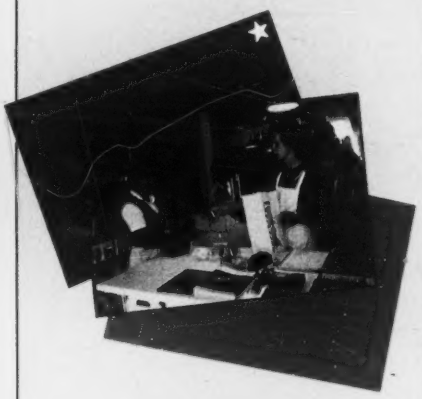
Single parents with children under 19 years old are eating out more often this year compared to last year, and 26% more often than married couples with young children.

Eating out more often than last year



TASTES OF AMERICA

Older consumers are catching on to convenience trends: 69% ordered takeout in the past month.



NUTRITION NOTE
Almost 96% of survey respondents who have eaten out at least once in the past month are more concerned about nutrition. But of those who ate out yesterday, 47% have the same concern.

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eaten out are lunch, 29.3% are dinner and 12.2% are breakfast.

Tastes of America results also reveal that the percentage of meals purchased for takeout, delivery, at a drive-thru window or via convenient services such as supermarket deli or the convenience store increased for the fifth straight year.

While young singles and families purchase the most convenience-oriented meals, older consumers are now catching on to the trend and driving the numbers even higher. In 1987, 54% of older working couples had purchased ready-to-eat food for takeout in the past month. This year, however, 69% fell into that category. Among older singles, older couples and older parents, the percentage taking out prepared foods increased from three to seven percentage points.

Consumption of prepared supermarket deli foods increased only slightly in 1988. "I don't use them," says Judy Shook, 41, single and the mother of a teen-age daughter. "If I don't cook, I like to go somewhere I can sit down. I don't like standing in supermarket lines if I only want something from the deli."

VanderPloeg adds, "I'm not sure if the quality is there . . . The grocery-store products aren't much cheaper than if I order out, and for some reason I can't put my finger on, the food doesn't taste as fresh as when I order out."

Survey respondents report that their purchases at convenience stores in the past month increased from 21.5% in 1987 to 23% in 1988. But some consumers complain about the quality of ready-to-eat items from c-stores. "It tastes artificial to me," says Shook. "I don't know when the food was set out, nor can I see the people who prepared it, even though it comes in a sealed package. . . . If I wanted to eat in my car, I would have prepared a brown bag meal by myself."

CONVENIENCE FACTOR GROWS IN IMPORTANCE
Since 1983, more diners have taken advantage of convenient services such as takeout, delivery and drive-thru. These services are especially popular with larger households and respondents from the Northeast.

Old versus the new

Loyalty is a common characteristic of 1988 Tastes of America respondents. Almost 77% of those surveyed visit a favorite restaurant when dining out. Loyalty is greatest among older retired couples (80.9%) and households of four or more. Almost 45% of all respondents go to old standbys at least 85% of time.

Quality service is most important to Milligan when she is deciding whether to return to a restaurant. "Good service means that the food has to be hot, the salad crisp and the waitress must be pleasant. I don't want someone hovering over me. I just want plain courtesy."

"We'll decide whether or not to go back to a restaurant based on a balance of qualities—food, atmosphere and price/value," says Fishleigh. "Price/value is the most important feature to us right now."

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TASTES OF AMERICA

Roberta Bailey (r.) is always on the go and trying many new restaurants.

Old favorites are preferred by almost 77% of respondents.

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Roberta Bailey, a married mother of three teen-age children, says service is most important to her family. "My husband demands service," she says. "I think you just have to like the people working at the restuarant."

Singles and young couples try new restaurants most often—27% of the time they eat away from home. On the average, consumers try a new restaurant 23.3% of the time they dine out. Falling under the average are older working couples (19.5%).

"Word of mouth entices me to try someplace new," says 26-year-old single Carla Melull. "I'm not swayed by reviews and I rarely read them. I don't go by what ads say either. What my friends say and what they think about the price and quality of a restaurant makes all the difference to me."

Survey results also show that America continues to frequent fast-food hamburger restaurants and coffee shops most often. More than 90% of families of five or more have eaten at fast-food hamburger restaurants in the past month. Households of two and older working couples frequent family restaurants/coffee shops most often. Comfort and familiarity are cited as the main reasons for these preferences.

Almost 75% of young families have dined at pizza restaurants in the past month, 40% more often than the average survey respondent. Nearly 50% of young singles and couples are eating at fast-food chicken restaurants, again 40% more often than the survey average.

Ethnic restaurant favorites, such as Mexican in the West and Italian in the Northeast, show continued strength. And, while 19% of all respondents have eaten at an Italian restaurant in the past month, more than 40% of young singles eat out Italian-style at least once a month. Oriental restaurants also gain a higher percentage of their support from young singles and couples. For example, the Fishleigh family is taking out a lot of Chinese food these days because it is convenient and the children have grown to like it.

AMERICANS STILL PREFER THE CLASSICS

While not among the top 10 restaurants patronized at least once a month, Mexican restaurants were visited by 44.2% of respondents from the West; 40.4% of young singles frequented Italian restaurants.

Restaurants visited in the last month	Total	North-east	North Central	South	West
Hamburger (fast food)	79.1%	72.7%	85.1%	77.9%	80.7%
Family/coffee shop	57.2	61.5	61.0	47.5	63.9
Pizza	54.7	59.7	56.1	50.8	53.6
Fine dining	38.4	46.2	38.4	31.2	42.1
Chicken (fast food)	34.1	23.8	29.9	42.9	36.1
Oriental	32.3	33.0	31.1	28.3	40.3
Submarine/sandwich shop	27.3	37.0	19.8	26.9	27.5
Seafood	27.0	30.0	18.9	32.6	24.9
Cafeteria	25.7	16.0	27.1	33.8	19.3
Steakhouse	25.3	18.3	23.5	31.4	24.9

TASTES OF AMERICA

Americans round out basic burgers-and-fries diets with chicken, fish and ethnic offerings.

HEALTHFUL FOODS GAIN GROUND

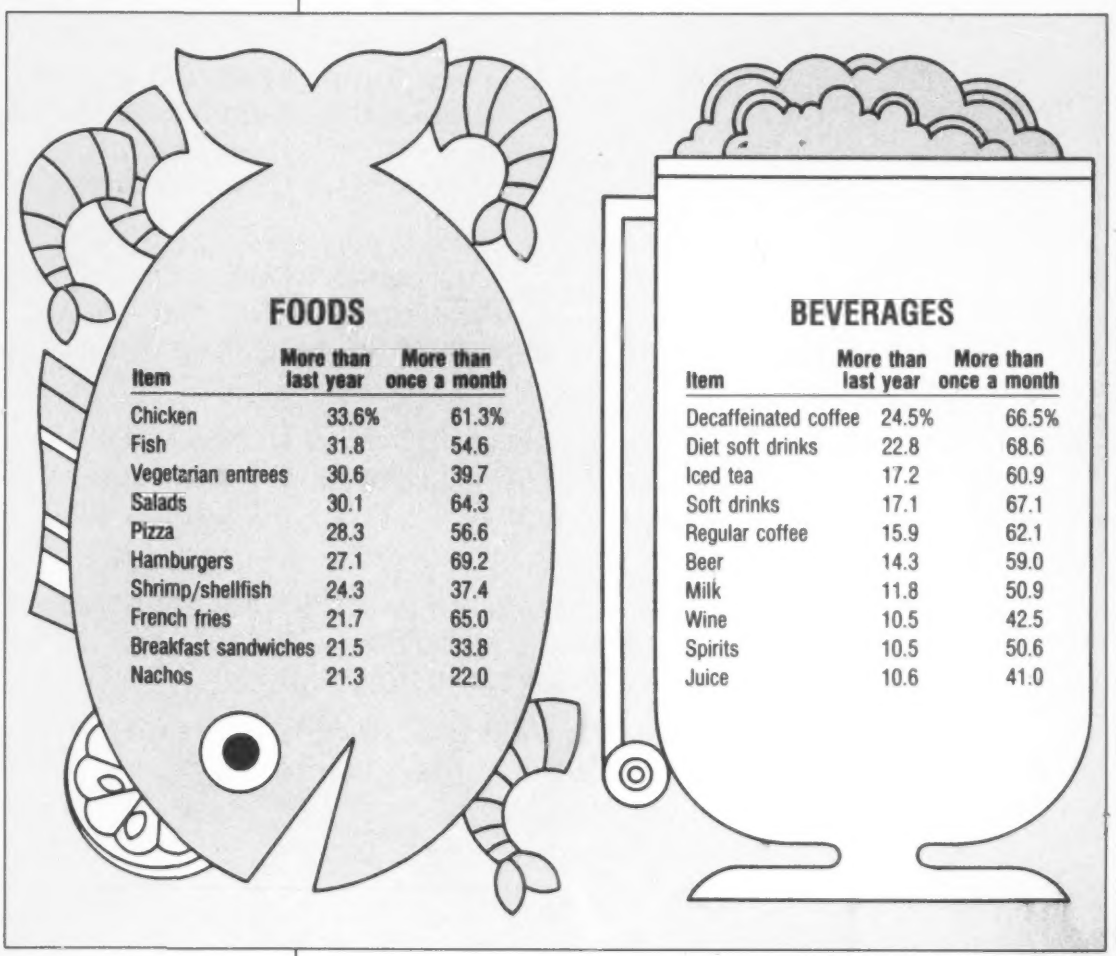
Foods perceived as healthful are gaining ground with customers, who are ordering chicken, fish and decaffeinated coffee more frequently than they did last year. The left column indicates the percentage of respondents ordering the item more frequently than last year. The right column indicates the percentage of customers ordering the item more than once a month.

The simple food-ordering facts in this year s Tastes of America survey reveal no trends that will rock the industry. Instead, the survey shows that the dining-out public has discovered the phrase "Everything in moderation." Top food choices of those polled include quick-service items, trendy fare, ethnic foods and a variety of beverages. Personal tastes affect food-ordering decisions, but so do convenience, nutrition concerns and family needs.

Because of the convenience factor, the most-ordered foods are those found on burger-chain menus. Two-thirds of respondents order a burger, fries and a soft drink more than once a month.

The soft drink most likely is a diet drink: 68.6% order diet soft drinks more than once a month, and 67.1% choose regular soft drinks. Both diet beverages and decaffeinated coffee are gaining in popularity.

Chicken and salads, the two foods quick-service chains are adding with most frequency, garner nearly as many orders. In this year's survey, 61.3% order chicken and 64.3% order salads more than once a month.



FOODS

Item	More than last year	More than once a month
Chicken	33.6%	61.3%
Fish	31.8	54.6
Vegetarian entrees	30.6	39.7
Salads	30.1	64.3
Pizza	28.3	56.6
Hamburgers	27.1	69.2
Shrimp/shellfish	24.3	37.4
French fries	21.7	65.0
Breakfast sandwiches	21.5	33.8
Nachos	21.3	22.0

BEVERAGES

Item	More than last year	More than once a month
Decaffeinated coffee	24.5%	66.5%
Diet soft drinks	22.8	68.6
Iced tea	17.2	60.9
Soft drinks	17.1	67.1
Regular coffee	15.9	62.1
Beer	14.3	59.0
Milk	11.8	50.9
Wine	10.5	42.5
Spirits	10.5	50.6
Juice	10.6	41.0

Indeed, restaurant patrons say that new menu items at chains affect their food-ordering habits. "Potatoes and salad bars have improved fast-food places," says young single Fernando Mendez, adding that burger alternatives encourage him to patronize chains more often. Annette VanderPloeg, the active mother of three, agrees. "We like the new salad bar at Wendy's and have gone there because of it," she says.

And children do make a difference. VanderPloeg says her whole family eats out more often because her adolescent children are busy with sports and music lessons, and often they pick the restaurant. Roberta Bailey and her husband, like other older couples, go out more often now that their children are teenagers: "We have more freedom now," Bailey explains.

Data from the survey supports their claims. Young people with children eat more ice cream, hot dogs, hamburgers and fries than their childless peers, who outrank them with orders of pasta salad, vegetables and grilled fish. But parents tend to order more "adult" foods after children grow up. The percentage of older parents who order vegetables, fruit, turkey, grilled fish and grilled chicken more than once a month is remarkably higher than the percentage of young parents who order such foods.

Choices reflect nutrition concerns

The growing popularity of chicken, salads, decaffeinated coffee and sugar-free soft drinks shows that concern about diet and nutrition still influences food choices.

Fish and vegetarian entrees have joined chicken and salads as the items most people are ordering more frequently. The two items have some distance to go, however, before they become part of the basic American diet. Half of the respondents say they order fish more than once a month, while 40% order vegetarian entrees more than once a month.

Since eating out has become a part of daily life, people depend on restaurant menus to help them watch what they eat. Even weight-conscious people do not stay out of restaurants. "I just order fish or chicken instead of meat when I'm on a diet," says Dorothy Milligan, a 75-year-old widow. Gary Fishleigh, age 33, is not concerned about nutrition, but says his wife is careful about what she eats: "We usually end up going to a restaurant that offers a little bit of everything," he comments.

Trends toward different methods of preparation accompany increased orders of chicken and fish. Last year, consumers said they preferred both fish and shellfish deep-fried. This year, shellfish is the only meat that people prefer deep-fried. Patrons like meats and fish broiled and poultry baked.

Consumers not satisfied with salad bars and broiled meats demand specific types of healthful foods. Of all the respondents, 68.3% want to see restaurants offer low-cholesterol, low-fat foods; 66.5% want low-sodium foods; 59.4% want low-calorie foods; and 53.1% want low-sugar foods.

Older working couples are most concerned about fat, with 80.4% calling for low-fat items, while 76.2% of the older retired people polled think low-sodium foods should be added to menus. Parents are the biggest advocates of caffeine-free soft drinks, perhaps thinking that active children do not need additional stimulants.

Ethnic foods still popular

Italian and Mexican food are the most popular ethnic cuisines. While the two cuisines cannot match mainstream foods in popularity, 40.2% of respon-

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Dorothy Milligan says frozen yogurt is the only dessert she eats.

DEEP-FRYING FIZZLES OUT

Low-fat cooking methods such as broiling and grilling have become such a part of the American diet that survey respondents now prefer only one food—shellfish—deep fried.

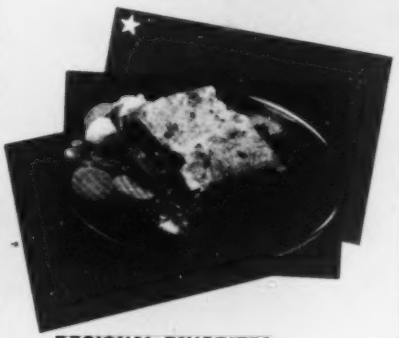
MEAT	
Broiled	56.7%
Grilled	53.9
Baked	46.3
Stir-fried	20.7

POULTRY	
Baked	59.4%
Broiled	36.1
Deep-fried	30.2
Grilled	26.3

SEAFOOD	
Broiled	43.4%
Deep-fried	41.6
Baked	26.1
Grilled	20.4

SHELLFISH	
Deep-fried	51.0%
Broiled	24.3
Stir-fried	18.8
Pan-fried	15.8

TASTES OF AMERICA



REGIONAL FAVORITES
Trends come and go, but different regions of the country keep ordering their favorites. Residents of the Northeast region are most likely to order Italian food during the year, while Southerners prefer spicy Mexican and Cajun dishes.

ITALIAN	
Northeast	86.8%
West	78.6
North Central	74.0
South	67.4

ORIENTAL	
West	85.5%
Northeast	73.8
North Central	66.7
South	64.7

MEXICAN	
West	92.9%
North Central	69.9
South	67.8
Northeast	39.6

FRENCH	
West	24.7%
Northeast	21.8
South	22.2
North Central	11.7

TEX MEX	
South	28.6%
West	22.6
North Central	11.8
Northeast	11.1

CAJUN	
South	32.8%
West	24.7
Northeast	21.9
North Centr.	19.5

More than two-thirds of all respondents would like restaurants to add low-sodium foods.

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dents order Italian food more than once a month, and 37.7% order Mexican food more than once a month. Oriental, too, does well in the survey, with nearly one-third of respondents giving it the nod more than once a month.

Singles are most likely to order Italian-influenced foods. All the older singles surveyed order pasta entrees more than once a month, and half say they order pasta salads more than once a month. Young singles order the most old-fashioned pizza, and show no signs of boredom: 39.6% order pizza more frequently this year than last.

Parents, however, prefer gourmet pizza. Young parents, more than any other group, order gourmet pizza more than once a month, and older parents are ordering the upscale pizzas more frequently these days. Nearly 40% of households with five or more people have increased their pizza orders, confirming that pizza is the top family pleaser.

Older singles and couples prefer Mexican-flavored dishes more than the other demographic groups. All the older singles surveyed order fajitas more than once a month, and half of them are ordering fajitas more frequently than last year. Older retired couples take the guacamole prize: one-third of that group order the dip more than once a month and are ordering it more frequently. The same percentage of older retired couples are ordering taco salad more often.

The convenience factor comes into play when customers order ethnic foods. Fishleigh says he orders Chinese food more frequently because he is ordering more meals for takeout or delivery in general. VanderPloeg likes full-service Mexican restaurants because they offer something for everyone in her family. For some people, pizza is the only food suitable for takeout and delivery. Thirty-one-year-old Tom Ardt, the married father of three children, says his family orders pizza once a month (always from Domino's), eschewing all other takeout foods. (Two-thirds of respondents have ordered pizza for at-home consumption during the past year.) *continued on page 69*

Annette VanderPloeg likes the options that Mexican restaurants offer.

TASTES OF AMERICA

Fajitas and pasta entrees are popular with older singles.

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That many people perceive ethnic food as difficult to prepare also makes it an eating-out favorite. "We cook burgers and steak at home," Fishleigh says. "It takes too much time to make Chinese or Mexican food." Mendez compliments the industry on ethnic foods: "I see that ethnic foods are prepared by people with the same ethnic backgrounds," he notes.

Several previous trend-setting cuisines now barely rate a mention. Only one-fifth of respondents order Cajun and Tex-Mex, two of the hottest ethnic cuisines to hit menus in recent memory, more than once a month. About 10% are ordering Cajun and Tex-Mex food more frequently than last year.

Of all the cuisines brought up in the survey, French food's status suffers the most. Once perceived as fancy and now viewed by many as stuffy, French fare is ordered more than once a month by one-fifth of respondents. Only 26.1% of respondents in households with more than $60,000 in annual income (arguably the most affluent of the bunch) order French food more than once a month: 59.6% from that bracket did not order French food during the past year.

Patrons leave room for dessert

Respondents in households earning more than $60,000 a year are more likely to order ice cream and sherbet; gourmet (high-butterfat) ice cream; and puddings and mousse than those from other income brackets. The Northeast leads the way in dessert: Respondents from that region ranked highest with orders of ice cream, muffins and rolls, cookies and gourmet ice cream. Western respondents order mousse and puddings more frequently than people in other regions.

Ice cream continues to be the most popular dessert, with almost half the respondents saying they order it more than once a month. Older retired people order the most ice cream. Older single people treat themselves to gourmet ice cream, and are ordering it more this year than last.

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Fernando Mendez likes ethnic foods, but sticks to burgers on weekdays.

Item	Young couple with children	Young couple without children
Ice cream	55.1%	34.6%
Chicken nuggets	44.3	30.8
Muffins	41.3	34.4
Fried fish	38.8	27.6
Vegetables	36.8	65.5
Taco salad	31.4	20.8
Cookies	22.2	16.7
Shrimp/shellfish	23.4	56.0
Steak	19.0	22.9
Grilled fish	17.6	45.8
Pasta salad	12.9	47.1
Fajitas	3.8	19.0

CHILDREN AFFECT EATING-OUT HABITS

More young parents than young couples without children say they order fast-food fare, such as burgers and fries, at least once a month. Couples without children order trendier foods regularly.

TASTES OF AMERICA

SHOPPING CART VS. PASTRY CART
The young in each lifestage say that groceries are a much better value than eating out, but the gap narrows among more mature groups. Dining away from home actually wins out among older singles and older retired couples—two groups that are growing fast.

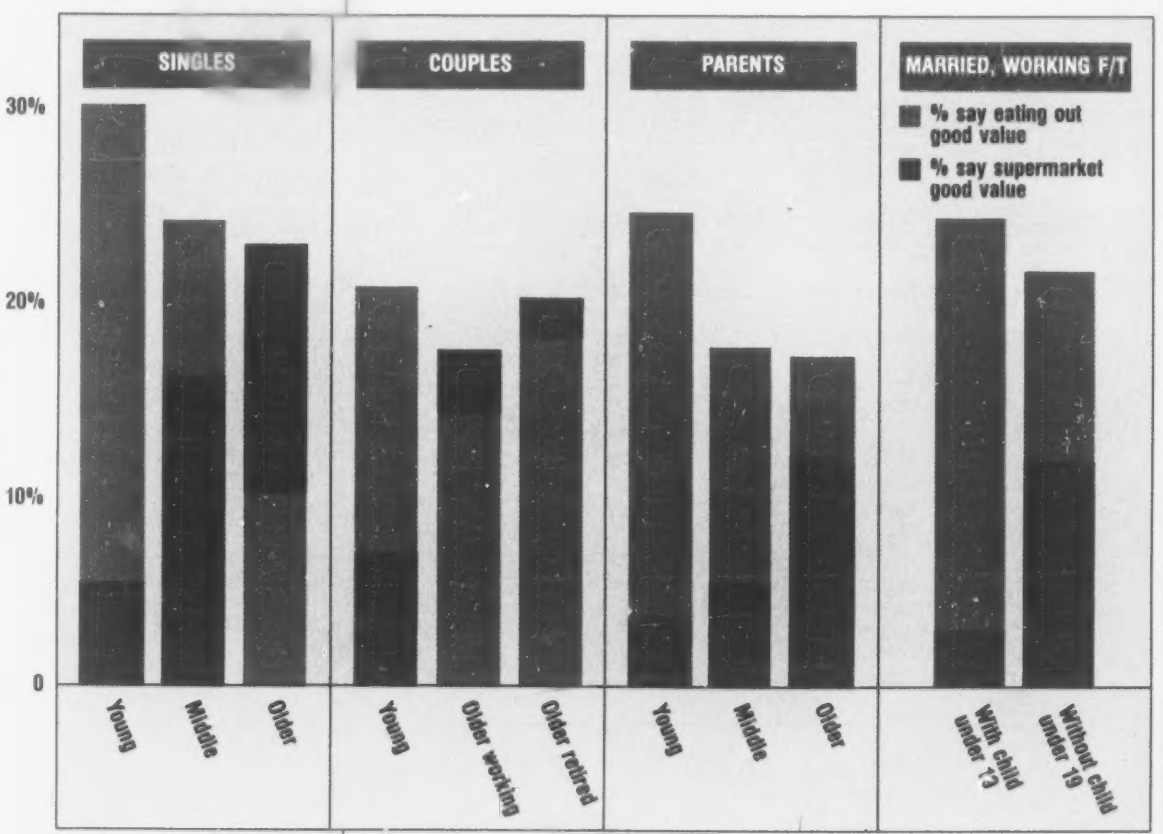
Value of eating out slips for general public but soars among older singles, older couples.

More people think they are getting less value for their foodservice dollar in 1988, according to this year's Tastes of America survey. The proportion of customers who say eating out is a good value has dropped to 11.3%—down more than two percentage points from last year. Meanwhile, the number of respondents who say foodservice meals are a poor value has risen two percentage points to 16.8%.

The latest survey also shows that cooking at home has gained pocketbook appeal in comparison to eating out. In 1987, the number of people who thought supermarket groceries were a good value was 6.6 percentage points greater than those who said the same for restaurant meals. This year's survey shows that gap has widened to 8.5 percentage points among respondents.

If this is not the best foodservice price/value index in the survey's history, it is very far from the worst. That low point came in 1981, when only 6.5% of respondents thought eating out gave a good return on the dollar while 35.2% disliked the value offered by meals away from home.

Respondents from younger age groups, larger households and lower-income brackets say that eating away from home holds the least attraction for them. But in practice many from these demographic groups take a broad view of costs, weighing the time and labor savings of restaurant dining against the out-of-pocket expense. "We keep telling ourselves that for the



$8 or $9 we spend at McDonald's, we could get a couple of good porterhouse steaks," says Gary Fishleigh, father of two young children. "But the convenience of going out gets in the way of eating at home. Not just cooking but planning and shopping take up so much time."

Annette VanderPloeg agrees that it costs less for her family of five to eat at home. "But the convenience of a restaurant makes up for the little extra we spend," she says.

But the big demographic news occurs at the other end of the scale. Singles over 65 and older couples, both working and retired (45 or over, no children present), now consider restaurant meals a better bargain than food prepared at home. In fact, the proportion of older singles who like the value of eating out has almost doubled since last year, when only 11.3% favored it. As Dorothy Milligan, who lives alone, puts it, "At supermarkets, you have a tendency to buy more than you'll use." Since the over-65 group is projected to grow from 25.8 million now to 44.3 million by the year 2020 (making up 17.3% of the total U.S. population) operators should begin tracking their eating habits with interest.

Complaint department

Tastes of America asks not only what makes customers tick but what ticks them off. What foodservice turnoffs are top of mind this year?

The good news is that smoking, which headed the list last year by irritating 48.4% of the public, is no longer the top restaurant nuisance. Unfortunately, the grievances that replace it strike right at the heart of the dining experience—service, food quality, price, value. Seven out of 10 respondents have encountered rude staff. Almost three in five complain that the food served them is sometimes of poor quality; and 65% say the meals are occasionally not worth the price.

Operators must decide for themselves if consumers are becoming more particular or just plain picky. But they are definitely becoming more fed up: This year's top six gripes all gathered more votes than last year's No. 1.

"We're typically satisfied when we eat out," says Fishleigh. "Our big problem is with price/value, especially with alcohol. In Hawaii, we paid $8 for a glass of wine and $3.50 for a beer."

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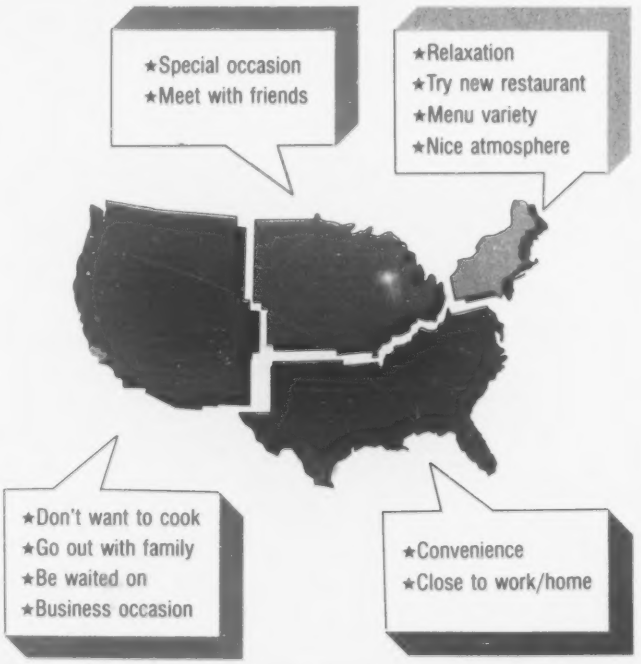
Tom Ardt (center) thinks groceries are a better buy than dining out.

REGIONAL REASONS

Why does the country dine out? Responses from different regions show the West wants to be waited on, the Northeast likes something new and convenience sells in the South.



TASTES OF AMERICA

Smoking and noise give way to gripes about the big issues: service, quality, price, cleanliness.

TRAFFIC SNARLS

Asked what most irritates them in restaurants, this year's respondents went straight to the heart of the price/value equation:

	1988	1987
Rude personnel	69.2%	47.0%
Not worth price	64.2	47.1
Poor quality food	58.1	47.1
Noise/loud music	57.9	47.9
Wait for table, service, food, check	52.8	41.5
Smoking	51.5	48.4
Being rushed	46.8	30.1
Lack of cleanliness	46.7	25.1
Wait in line for food	37.8	26.9
Feeling crowded	36.4	25.6

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"I know places get busy," says 22-year-old Fernando Mendez, "but I want them to tell me they're busy and then take care of me as best they can."

Most surprising may be the size of the group that complains of dirty restaurants. This year's percentage is almost double the 25.1% who found cleanliness an occasional problem last year.

Hot tips, cooler on labels

Perhaps in reaction to these bad experiences, 81.7% oppose an automatic service charge. The public seems intent on reserving the privilege of the final verdict on services rendered. Those from households that dine out more than seven times a week are particularly set against the gratuity, as are those who spend more than $25 a week in restaurants.

"Just this week we got some terrible service," says Carla Melull, a 26-year-old single. "I like the advantage of letting [the servers] know that."

Others feel a fixed 15% or even 20% would short-change servers who work hard for the money. "Most of us are grandmothers," Milligan says, referring to her usual lunch group. "We realize the kids are there to earn money, and we're a little over-generous."

Yeas still outnumber the nays on the issue of labeling ingredients in fast food, but their ranks have thinned since last year. Then, 78.1% favored such labeling; today 73.4% feel the same way. At the same time, two out of three respondents are "more concerned about nutrition" compared to one in two who said so last year. A contradiction? Perhaps not. The nutritionists may really be counting calories instead of watching vitamins or additives. Mendez, for example, says he thinks about nutrition when eating away from home, "especially right now, when I need to watch my weight." But as for any list of fast-food ingredients—"I don't need to see it," he says.

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At her favorite eating spot, Judy Shook (r.) says she "doesn't feel rushed."

TASTES OF AMERICA

Carla Melull (r.) says she wants service at lunch, quality at dinner.

FAST OR GOOD?
The survey asked respondents to analyze a "good" dining experience in different price ranges (fast food under $5, midscale $5 to $12.) The result ranks customer expectations for each segment in descending order.

Fast food	Midscale	Fine dining
Speed	Food quality	Food quality
Clean	Clean	Taste of food
No wait for food	Good service	Good service
Food quality	Food taste	Pleasant atmosphere
Food taste	Good value	Clean
Good value	Friendly	No rush
Good service	Pleasant atmosphere	Well-trained staff
Friendly	Service attitude	Friendly
No wait for table	Variety	Service attitude
Consistency	No rush	Honor reservation
Well-trained staff	Consistency	Variety
Service attitude	Well-trained staff	Consistency
Pleasant atmosphere	Speed	First impression
No rush	No wait for table	Good value (food)
Good lighting	No wait for food	No wait for table
Variety	First impression	No wait for food
First impression	Good lighting	Speed
Honor reservation	Honor reservation	Good lighting

Fast-food customers care more about speed than food quality.

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Customer "wish list"

Finally, new questions in this year's survey asked participants to rank 18 different elements of a good dining experience at fast-food, midscale ($5 to $12 check averages) and fine-dining restaurants. The responses give a thumbnail sketch of the hierarchy of customer "wants" in each segment.

Not surprisingly, 66.4% of customers at quick-service outlets want quick service. But among midscale patrons, speed drops down to 13th in importance, three notches below "not feeling rushed." Only 38.2% of midscale diners polled say fast service adds to the dining experience. And a full 53.6% want to take their time when eating at an upscale restaurant.

Only adequate lighting is less important to these customers than speedy service. On the other hand, 65% demand *good* service, as do 63.9% of midscale patrons. Naturally, this varies with the daypart. "Quick service is most important to me at lunch," says Melull. "But quality and service are most important at dinner."

Food taste and quality also seesaw in importance from segment to segment. They are the two most vital concerns in fine dining, as one might expect, and midscale diners rank them first and fourth. But among fast-food customers, only 56.5% think food quality adds to the meal occasion, and less than half say taste is important. Rather than suggesting indifference, these results may simply mean that quick-service diners assume a certain level of execution when they choose a restaurant. They know what quality and taste to expect before they walk through the door.

Finally, one value remains fairly constant: more than 60% of all those surveyed say a clean operation is vital to dining satisfaction. Together with the 46.7% who have experienced dirty restaurants, this points out an obvious place to begin shoring up foodservice as a value in preparation for next year's 10th anniversary edition of the *R&I* Tastes of America survey. R&I

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